

Message Text

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ACTION EUR-12

INFO OCT-01 ISO-00 EB-07 /020 W
----- 012247

R 200956Z APR 76
FM AMEMBASSY BONN
TO SECSTATE WASHDC 8209
INFO USDOC WASHDC
USMISSION USBERLIN
AMCONSUL BREMEN
AMCONSUL DUSSELDORF
AMCONSUL FRANKFURT
AMCONSUL HAMBURG
AMCONSUL MUNICH
AMCONSUL STUTTGART

UNCLAS SECTION 01 OF 03 BONN 06551

E.O. 11652: N/A
TAGS: BEXP, GW
SUBJ: PRELIMINARY INPUTS FOR FY'78 COUNTRY COMMERCIAL
PROGRAM

REF: (A) STATE 54879 (B) BONN 2595 (C) BONN A-398,
OCTOBER 7, 1975

1. IN RESPONSE TO REQUEST REF (A), THIS MESSAGE SETS
OUT EMBASSY'S RECOMMENDATIONS FOR CAMPAIGNS AND
NON-CAMPAIGN INITIATIVE ACTIVITIES AND RESOURCE
REQUIREMENTS FOR FY 78. CAMPAIGNS AND NON-CAMPAIGN
ACTIVITIES ARE LISTED IN RANK ORDER OF PRIORITY.

2. TO AVOID REPETITION, JUSTIFICATIONS ARE OMITTED
FOR THOSE CAMPAIGNS WHICH ARE IDENTICAL TO FY 77
CAMPAIGNS. THE FINAL FY 77 CCP CAMPAIGN SELECTION
AND JUSTIFICATION WAS ONLY RECENTLY COMPLETED AND
TRANSMITTED TO COMMERCE FOR PRINTING. WITH THE
EXCEPTION OF THE CAMPAIGN "COMPUTERS AND RELATED
EQUIPMENT" FOR WHICH NEW DATA HAVE BECOME AVAILABLE
IN THE INTERIM, THESE FY 77 CCP CAMPAIGN STATEMENTS
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REPRESENT THE MISSION'S CURRENT BEST JUDGMENT FOR

FY 78 AS WELL. RATIONALE FOR TRADE FAIR SELECTION IS CONTAINED IN REF. (B).

3. CAMPAIGN STATEMENTS

A. ELECTRONICS PRODUCTION AND TEST EQUIPMENT: SEE FY 77 CCP. AS THE MAJOR PROMOTIONAL EVENT, WE RECOMMEND USG PARTICIPATION IN THE FAIR "PRODUCTRONICA" IN MUNICH 11/5-9/77.

B. COMPUTERS AND RELATED EQUIPMENT: BASED UPON A GLOBAL MARKET RESEARCH SURVEY OF THE GERMAN MARKET SUBMITTED APRIL 7 BY DR. KINDEL, WE HAVE MOVED THIS CATEGORY UP ONE NOTCH ON THE PRIORITY LISTING FOR FY 78. IT NOW APPEARS THAT GERMAN IMPORTS OF THIS CATEGORY IN 1977 AND 1978--SPURRED BY HEAVY DEMAND FOR PERIPHERAL EQUIPMENT--SHOULD GROW AT AN ANNUAL RATE OF AT LEAST TEN PERCENT INSTEAD OF THE FIVE PERCENT FORECAST IN THE LATEST BEST PROSPECTS REPORT (REF. C). AS THE MAJOR PROMOTIONAL EVENT IN THIS FIELD, WE ONCE AGAIN RECOMMEND USG PARTICIPATION IN "SYSTEMS": "SYSTEMS 77" WILL BE HELD IN MUNICH 10/17-21/77.

C. ELECTRONIC COMPONENTS: SEE FY 77 CCP.

D. LABORATORY INSTRUMENTS: SEE FY 77 CCP. WE RECOMMEND USG PARTICIPATION IN "ANALYTICA," WHICH WILL BE HELD IN MUNICH 4/18-21/78.

E. POLLUTION CONTROL EQUIPMENT: SEE FY 77 CCP. AS THE MAJOR PROMOTIONAL EVENT, WE RECOMMEND PARTICIPATION IN "AUTOMECHANICA" IN FRANKFURT SEP. 1978. EVEN THOUGH ONLY A PART OF THE EQUIPMENT NORMALLY EXHIBITED AT "AUTOMECHANICA" WOULD FALL INTO THE POLLUTION CONTROL CATEGORY, WE FEEL THAT IT IS A WORTHWHILE SHOW THAT FITS THIS CAMPAIGN DESIGNATION BETTER THAN ANY OTHER AND THEREFORE WOULD COUNT THE RESOURCES DEVOTED TO PARTICIPATION UNDER THIS CAMPAIGN. AN ATTEMPT WOULD BE MADE TO PROMOTE OTHER TYPES OF POLLUTION CONTROL EQUIPMENT BY RECRUITING BSP-TYPE EVENTS.

F. FOOD PROCESSING AND PACKAGING EQUIPMENT: WHILE THIS CATEGORY DID NOT LOOK EXCEEDINGLY PROMISING AT THE TIME OF THE 1975 BEST PROSPECTS STUDY, CONSUMER UNCLASSIFIED

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SPENDING IN GENERAL IS ALREADY REBOUNDED VIGOROUSLY FROM DEPRESSED 1975 LEVELS AND WE FEEL THAT FOOD PROCESSING AND PACKAGING EQUIPMENT WILL BE A MAJOR BENEFICIARY OF THIS TREND OVER THE NEXT TWO YEARS. FURTHERMORE, CAMPAIGN PLANNING SHOULD ALSO BE BASED TO SOME EXTENT ON CAPITALIZING ON MAJOR INTERNATIONAL FAIRS HELD IN GERMANY. "INTERPACK," WHICH IS HELD ONLY EVERY THREE YEARS AND IS ONE OF THE MOST IMPORTANT

SHOWS IN THE WORLD IN THIS FIELD, CLEARLY FALLS INTO
THIS CATEGORY. WE THEREFORE RECOMMEND BUILDING THIS

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ACTION EUR-12

INFO OCT-01 ISO-00 EB-07 /020 W
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R 200956Z APR 76
FM AMEMBASSY BONN
TO SECSTATE WASHDC 8210
INFO USDOC WASHDC
USMISSION USBERLIN
AMCONSUL BREMEN
AMCONSUL DUSSELDORF
AMCONSUL FRANKFURT
AMCONSUL HAMBURG
AMCONSUL MUNICH
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CAMPAIGN AROUNDNESS PARTICIPATION IN "INTERPACK 78"
WHICH WILL BE HELD IN DUSSELDORF JUNE 8-14, 1978.
G. CONSUMER GOODS: SEE FY 77 CCLIM WE HAVE DROPPED
THIS CAMPAIGN A FEW NOTCHES IN THE PRIORITY RANKING
UNTIL THE RESULTS OF USG PARTICIPATION IN SPOGA,
TO BE HELD IN SEPTEMBER OF THIS YEAR, ARE KNOWN.
THESE RESULTS WILL TELL US A GREAT DEAL MORE ABOUT
THE POTENTIAL FOR US EXPORTS OF CERTAIN TYPES OF
CONSUMER GOODS. IF OUR PARTICIPATION IS AN OUTSTANDING
SUCCESS, THIS CAMPAIGN WOULD CERTAINLY BE MOVED UP ON
THE PRIORITY RANKING AND WE WOULD FURTHERMORE
RECOMMEND A REPEAT PARTICIPATION IN SPOGA TO BE
HELD IN KOLN IN SEPTEMBER 1978.
H. BUSINESS EQUIPMENT AND SYSTEMS: SEE FY 77 CCP.
I. HEALTH CARE INDUSTRIES: SEE FY 77 CCP. IN
ASSIGNING THIS CAMPAIGN A LOWER PRIORITY IN FY 78,

WE HAVE TAKEFSINTO ACCOUNT THE FOLLOWING DEVELOPMENT.
THERE HASBEEN CONSIDERABLE PUBLIC SPECULATION THAT
HEALTH CARE EXPENDITURES IN GERMANY ARE DISPROPORTIONATE
TONEEDS. TRADE SOURCES HAVE SPECULATED THAT IMPROVED
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ADOPNISTRATION OF MEDICAL INSQCANCE SCHEMES AND
REDUCTION OF EXCESSIVELY LONG PERIOFOIZF HOSPITAL
CONVALESCENCE COULD RESULT IN AHAECLINE IN
EXPENDITURES FOR NEW MEDICAL PLANT AND EQKGPMENT IN
THE COMING YEARS. IT WILL BE SOME TIME BEFORE
GOVERNMENT REACTION TO THI FPRESSURE IS CLARIFIED
AND SUBJECT TO ANALYSIS.

J. ENERGY FPSTEMS: AN ADEQUATE SUPPLY OF ENERGY
WILL BE ONE OF THE MAJOR PJPBLEMS KXCING GERMANY IN
THEYEARS TO COME. WE THEREFORE CONSIDER IT INEVITABLE
TMUT THE MARKET FOR RELATED EQUIPMENT IN GERMANY WILL
IMPROVE CONSIDERABLY IN THE FUTURE. ALTHOUGH THE US
IS NOT ABLETO COMPETE IN CERTAIN CATEGORIES OF
EQUIPMENT FORTRADIOONAL SYSTEMS, WE FEEL THAT
RECOURSE TO NEWS PES OF ENERGY SYSTEMS WILL BEGIN
TO DEVELOP IN GERMANY BY FY 78.

K. MATERIALS HANDLING EQUIPMENT: IN 1975 GERMAN
IMPORTS OF MATWIALS HANDLING EQUIPMENT FROM THE US
JUMPED BY MORE THAN 50 PERCENT TO \$24 MILLION. THE
US MARKET SHARAQWAS 11.1 PERCENT VERSUS 9.7 PERCENT
IN 1974. THIS DYNAMIC DEVELOPMENT OF US EXPORTS TO
GERMANY INDICATES THAT THERE IS A SUBSZNTIAL DEMAND
WHICH SHOULD CONTINUE TO GROW WITH THE GENERAL
ECONOMIC RECOVERY. WE BELIEVE THIS TARGET OF
OPPORTUNITY WILL MERIT CAMPAIGN STATUS IN FY 78.

4. NON-CAMPAIGN INITIATIVE ACTIVITIES: SAME AS
ACTIVITIES 2, 3 AND 4 OF FY 77 CCP.

5. PERSONNEL RESOURCES:

A) CAMPAIGN - FSO/R, 1800 WORKDAYS

FSL/P, 2500 WORKDAYS

FSS, 2581 WORKDAYS

FSL/C, 1200 WORKDAYS

B) NON-CAMPAIGN - FSO/R, 5240 WORKDAYS

FSL/P 8118 WORKDAYS

FSS, 1281 WORKDAYS

FSL/C, 1822 WORKDAYS

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R 200956Z APR 76
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TO SECSTATE WASHDC 8211
INFO USDOC WASHDC
USMISSION USBERLIN
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6. FINANCIAL RESOURCES

A) CAMPAIGN -- TRAVEL	\$19,082
REPRESENTATION	7,195
CONTRACT SERVICES	0
MISCELLANEOUS	8,400
SUB TOTAL	\$34,675

B) NON-CAMPAIGN -- TRAVEL	\$12,721
REPRESENTATION	8,792
CONTRACT SERVICES	15,015
MISCELLANEOUS	49,350
SUB TOTAL	\$85,880
GRAND TOTAL	\$120,555

7. JUSTIFICATION FOR POSITION INCREASE: BY
REALIGNING PRIORITIES UNDER THE GUIDANCE OF THE CCP,
GERMAN POSTS HAVE BEEN ABLE TO STEADILY INCREASE

OUTPUT OVER THE PAST TWO YEARS WITH NO INCREASE
IN STAFF. ASSESSING REALISTICALLY OUR STAFFING
REQUIREMENTS IN LIGHT OF THE SCRUTINY BEING APPLIED
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TO E/C RESOURCES IN DEVELOPED COUNTRIES, WE ARE
REQUESTING ONLY ONE NEW POSITION FOR FY 78. ANOTHER
FACTOR THAT WILL ASSIST GERMAN POSTS IN ABSORBING THE
SHEER INCREASE IN PAPERWORK IS THE RECENT ACQUISITION
OF WORD PROCESSING EQUIPMENT FOR EACH POST. GIVEN
THESE CIRCUMSTANCES, THE ONE POSITION INCREASE WE FEEL
IS JUSTIFIED IS A FSL/6 CLERK-TYPIST POSITION FOR
CONSULATE GENERAL STUTTGART. A RECENT ANALYSIS OF COM-
MERCIAL POTENTIAL IN THE RESPECTIVE CONSULAR DISTRICTS
IN GERMANY INDICATES CLEARLY THAT THE E/C SECTION IN
STUTTGART IS UNDERSTAFFED. IN ORDER FOR THE POST TO
FULLY EXPLOIT THE POTENTIAL OF ITS DISTRICT--WHICH
ACCORDING TO OUR ANALYSIS IS SECOND ONLY TO THE
DUSSELDORF CONSULAR DISTRICT--IT REQUIRES THE ASSISTANCE
OF A CLERK-TYPIST IN ORDER TO FREE THE EXISTING FOUR
FSL PROFESSIONALS TO CONCENTRATE MORE ON SUBSTANTIVE
WORK IN CONJUNCTION WITH CCP CAMPAIGNS.
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